C125-1

Broadcasting Dec 10

Reaching over 117,000 readers every week — 60th Year 1990

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Tribune examines British radio channel joint ventures

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Weak retail market impacts TV advertising

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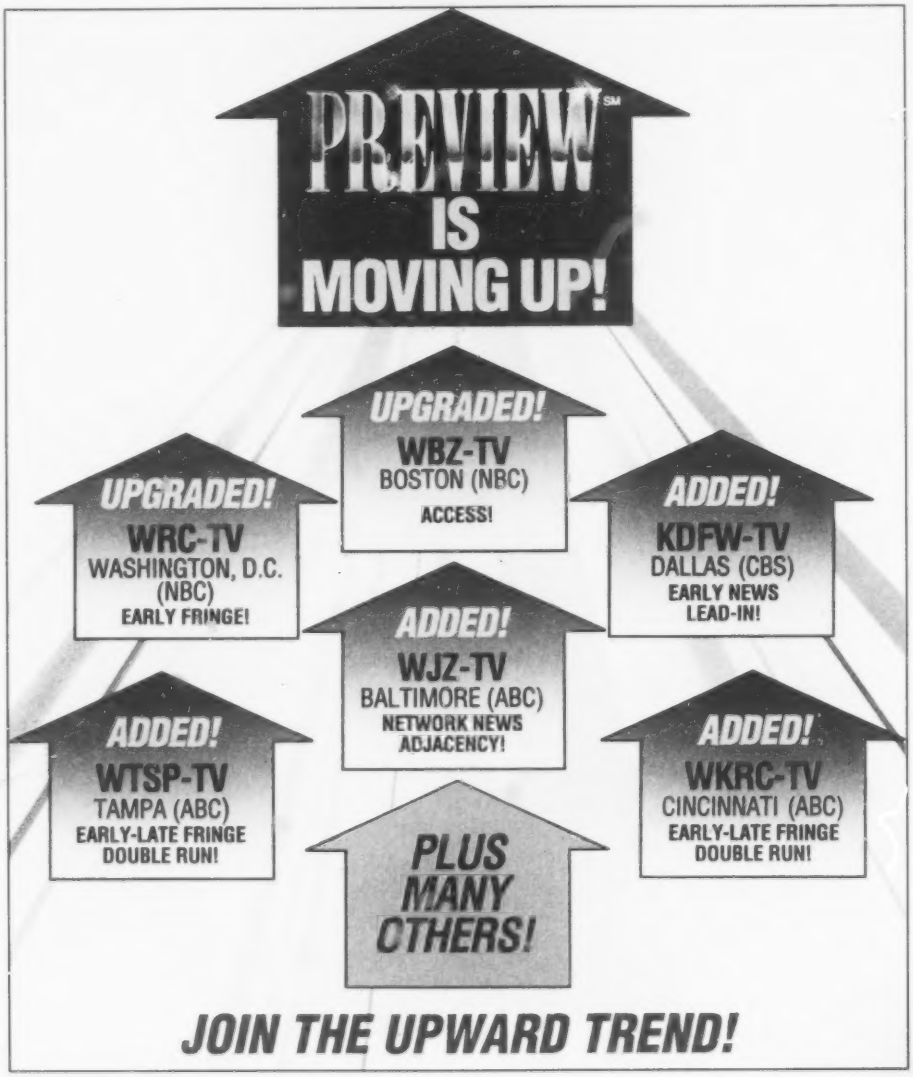
SkyPix and Comsat end talks, questioning each other's bankability



Vol. 119 No. 24

Effective Competition

THIS WEEK

47 / CABLE COMPETITION STANDARDS

The FCC is set to issue new effective competition standards for the cable industry, which could bring the basic service of most cable systems under municipal regulation. The FCC is proposing a three-part test: systems whose penetration exceed 50% or who have six broadcast stations in the market would be subject to regulation. Other tests would likely include the amount of multichannel video competition and "a good actors" test.

49 / DEJA VU

According to Nielsen Media Research, the number of prime time programs repeated so far this season is 37, up 48% from the 25 programs repeated up to this point a year ago. More reruns are seen as a network strategy to keep costs down in a revenue-scarce fourth quarter. Networks are also putting off schedule changes and cancellations until first quarter 1991 to avoid losing advertising money. That also means fewer holiday specials.

50 / IT'S IN THE MAIL

Producers are awaiting word from the networks on what will happen with many first-year shows. All of the networks have given back-end orders to most of their new shows, but each—with the exception of ABC—have at least a couple first-year series that will be notified of their fates this week or next.

53 / MARKEY AGENDA

Passage of a comprehensive cable regulation bill is House Telecommunications Subcommittee Chairman Ed Markey's top priority. The subcommittee chairman also plans to develop separate legislation addressing the issue of permitting telephone companies to offer video services.

56 / INTV HANGS TOUGH

Despite the growing number of distributors declining to screen new programs for the Jan. 3-5 INTV convention in Los Angeles, INTV officials say the lobbying organization remains a healthy and vital torch bearer for independent stations. To foster increased station participation and sales, the INTV convention planning board has instituted a contest to promote visitation of distributors' screening suites. However, 18 companies that screened at last year's INTV gathering have pulled out this year to possibly concentrate declining budgets on NATPE's Jan. 14-18 International Program Conference.

59 / SWEPT OUT

Post-November sweeps results claimed the first official game show casualty last week, with ITC Domestic Television informing clients that it will discontinue distribution March 8. Among other first-run game show strips facing the battle for survival, Buena Vista Television's *The Challengers* was downgraded from 3 p.m. on WLS-TV Chicago to 2:30 a.m., and sources have indicated that WNBC-TV New York is ready to move the show out of its coveted 7:30 p.m. slot.

An inside look at Hispanic communications (page 67)

67 / SOMETHING SPECIAL

Advertising expenditures in Hispanic TV and radio increased to $480 million-plus in 1990, even as this segment of the media industry continued to outpace its English-language counterparts. Advertisers are coming to the table, but the industry is still grappling with problems of audience definition and measurement. In both TV and radio, ratings services are in heated battles for market dominance. Meanwhile, programers of Spanish-language TV have ever larger libraries from which to choose, and Hispanic radio operators continue to thrive with techniques borrowed from English-language radio. Using narrowcasting and niche targeting to compete with mainstream stations, they are winning in markets such as Miami, Los Angeles, New York and San Antonio.

85 / FRIENDLY COMPETITION

In an unusual arrangement, Fox affiliate WOLF-TV Scranton, Pa., has reached an agreement with the ABC affiliate there to air WOLF-TV's 10 p.m. newscast exclusively on the competitor's airwaves. It all begins Jan. 2, 1991.

86 / LOOKING TO NEXT YEAR

There were no breakthrough deals for new programers at the Western Cable Show, but most express confidence they will be able to weather another difficult year in 1991 as they search for channel space and operator interest in carrying them.

91 / HOLIDAY BLUES

Retail spending by consumers is expected to be off this Christmas, which is bad news for TV stations that have developed a dependency on ad revenue from department stores, discounters and other retailers. A survey of TV sales managers indicates a gloomy holiday season, with several looking at new marketing methods to bring in new money.

96 / TRIBUNE KICKS TIRES

Tribune Broadcasting has been quietly checking out British communication companies to determine whether, and with whom, to form a joint venture for a new national "speech" (news/talk) channel to be allocated on the AM band by the U.K. government. ITN, an independent broadcast news supplier, appears to be the top suitor at the moment.

98 / HOLIDAYS ENGULF TROOPS

As the 1990 holidays approach, radio stations nationwide have developed special promotional campaigns to bring season's greetings to American troops based in Saudi Arabia and the Persian Gulf.

101 / MATTER OF ETHICS

The FCC has liberalized its interpretation of the ethics rules, making them "more responsive, more consistent with the ethics law," said the FCC general counsel.

102 / FIN-SYN EN BANC HEARING

Rich Frank, president of Walt Disney Studios, is expected to use the Dec. 14 FCC fin-syn en banc hearing to push for modification of the prime time access rule. Disney believes that maintaining PTAR threatens the quality and economic viability of network programing because the emergence of Fox has drastically reduced the number of syndication outlets available. Aside from Disney, there is little support, especially at the FCC, for modifying PTAR.

105 / UNDONE DEAL

Why did several months' optimism about securing a $100 million Comsat investment in SkyPix's mid-power Ku-band satellite 'video store' turn suddenly sour? Sources in and out of Comsat and SkyPix pointed less to doubts about SkyPix's digital video compression technology than to the ability of each party to raise money. Both companies said they remain champions of mid-power and vowed their plans for the newest generation of direct-to-home TV will become reality, together or separately.

Rerunning network shows such as 'The Wonder Years' is one way to curb fourth-quarter costs (page 49)

107 / NEW MEDIA

A group of Western media experts gathered in Prague to help Czechoslovakians redraft their country's new media law.

110 / NO EASY CHOICE

Faults with all three of the FCC's proposed bands for digital audio broadcasting were discussed in comments to the commission's WARC-92 inquiry. But one proposal, 1493-1525 MHz, seemed to emerge as the most realistic option. The National Association of Broadcasters said that the FCC "cannot be rushed" and should not choose any DAB band until transmission system design questions are answered.

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CBS NEWS EXPECTED TO CUT 'AMERICA TONIGHT'

Likely loss of show should not result in staff cuts; move will make room for original action-adventure dramas in same time slot

CBS News, in an environment of cutbacks at the division, is expected to lose *America Tonight* next month as the network makes room for original new action-adventure dramas in the late-night slot.

But the likely loss of *America Tonight* should not result in any additional staff cutbacks, according to Lane Vernados, executive producer of the show. He said the program's staff of 30 would likely return to the CBS units from which they originally came. "It's not impossible to believe one or two secretarial or production assistant level positions could be lost," he said.

The apparent job security among *America Tonight* staffers should be a welcome assurance from CBS News management, which is said to be eliminating up to 50 jobs by year-end. CBS News and rival news divisions have been scaling back as a result of multimillion dollar coverage of the Persian Gulf crisis and a softening marketplace.

CBS News in recent weeks has closed its Chicago and Denver bureaus, as expected (BROADCASTING, Nov. 19). Chicago dropped five staffers and 10 union technicians were moved to O&O WBBM-TV there, where the division plans to maintain one correspondent and one producer at an as-yet-undetermined location. Denver lost one producer and a correspondent will work from home.

CBS affiliates, still smarting from the network's announcement to cut compensation, appear to be accepting the news cutbacks as a sign of the times. "It is regrettable, but news has to answer to the economics of the times like everybody else," said E. Berry Smith, chairman of the CBS affiliate board, a sentiment echoed by several other affiliates.

And despite cutbacks, CBS News continues to develop such projects as *Who's Side Are You On?*, produced by Andrew Heyward, which will look at several sides of a controversial issue. Also, the network last week devoted its weekly *48 Hours* to a pair of half-hour courtroom stories, designed as a possible recurring segment on the prime time news show or as a potential standalone half-hour series. **-RB**

RADIO WEEKLY REACH ON AM-FM STATIONS
Monday-Sunday, 24-hour day

	Persons	*Adults*	*Men*				*Women*				*Teens*
	12+	*18+*	*18+*	*18-24*	*25-54*	*55+*	*18+*	*18-24*	*25-54*	*55+*	*12-17*
Both AM and FM	32%	34%	36%	25%	40%	35%	31%	18%	32%	35%	16%
AM	10%	11%	11%	2%	6%	26%	12%	1%	6%	27%	2%
FM	54%	51%	49%	72%	52%	29%	53%	79%	59%	28%	81%
Do not listen	4%	4%	4%	1%	2%	10%	4%	2%	2%	10%	1%

Source: RADAR 42, Volume 1, Fall 1990. Copyright Statistical Research Inc.

Radio continues to be the medium of choice, according to just-released numbers in the fall 1990 RADAR report. Approximately 96% of persons aged 12 and older listen to or hear radio during the course of a week. On a projected basis, the figure translates into almost 194 million people. In addition, the report finds that more than 156 million people, or 77% of the population, are reached by stations associated with networks that are measured by RADAR. In an average quarter hour throughout a week, almost 24 million persons listen to the radio.

Other radio usage patterns posted in RADAR include listening to FM versus AM stations. The numbers show that FM radio maintained its 77% share of persons aged 12 and older (a percentage first achieved in 1989). Total reach per band varies by age. Teen-agers prefer FM overwhelmingly over AM, 81% listen solely to FM. Only 28% of persons aged 55 and over listen to FM.

The current RADAR results reflect radio usage during the measurement year of November 1989 through October 1990. Estimates apply to persons 12 years of age and older, Monday-Sunday, total day. The RADAR network audience reports are based on station clearances of programs and commercials and are scheduled for release in February, 1991. The 1990 RADAR studies are jointly sponsored by ABC, CBS, National Black Network, Sheridan Broadcasting, Unistar, Westwood One Radio Networks, advertisers and agencies.

TISCH EXPLAINS PAYMENT CUTS

The war—so far mostly words—between CBS and its affiliates, has continued since the network announced a 20% across-the-board cut in the cash compensation paid to affiliates (BROADCASTING, Nov. 26). CBS last week sent a seven-page letter under the signature of President and Chief Executive Officer Laurence Tisch that restated the reasons for the reduction—partially offset by giving affiliates incremental ad inventory of roughly six-and-a-half minutes per week. The letter said: "With each passing week, network advertising has been weaker and our financial situation has worsened." It blamed much of the "flattened" three-network revenue picture on cable and Fox. Tisch added that CBS cut its 1991 budget by "another $80 million from our own operations."

For its part, the CBS affiliate board has asked its counsel to examine whether a more aggressive posture vis-a-vis the network would put it in conflict with antitrust law, and whether it might be possible to get a "limited exemption" from that law. Affiliate Board Chairman E. Berry Smith said the purpose of an exemption would be to allow the board "to say something or to encourage our group to do something. It might make our relationship [with CBS] a little more even-keeled." Smith said he believed such an exemption would require congressional action.

The board and CBS will meet again in January at a business meeting in Los Angeles that has replaced a longer meeting previously planned for Hawaii.

RATINGS ROUNDUP

After losing the previous week to ABC, NBC bounced back to a strong ratings win for the week of Nov. 26-Dec. 2. NBC averaged a 13.1 rating and 21 share, while ABC and CBS battled it out for second place with ABC coming out on top by one-tenth of a rating point, 12.4/20 to CBS's 12.3/20. Fox averaged a 5.9/10.

Week 11 **Nov. 26–Dec. 2**

1st column tells rank, 2nd column tells position compared to last week: ▼-Down in rank from last week, ▲-Up in rank from last week, ■-Premiere broadcast. 3rd column tells rating, 4th column tells network, 5th column tells show.

1	▲	20.4/32	N	Cheers
2	▼	19.8/32	C	60 Minutes
3	▲	18.6/29	N	A Different World
4		18.3/27	A	Roseanne
5	▲	18.1/28	N	Cosby Show
6		18.0/26	C	Murder, She Wrote
7		17.9/28	N	Hallmark: Decoration Day
8	▼	17.8/27	C	Murphy Brown
9	▲	17.6/31	N	Empty Nest
10	▲	17.3/26	N	Matlock
11	▼	17.1/26	C	Designing Women
12	▲	17.0/26	C	Major Dad
13	▼	16.8/25	A	Amer. Funniest Videos
13	▼	16.8/28	A	Monday Night Football
15	▲	16.6/26	N	Unsolved Mysteries
16	▼	16.5/29	N	Golden Girls
16	▲	16.5/25	N	Heat Of The Night
18	▲	15.9/27	A	Family Matters
19		15.8/24	A	Doogie Howser, M.D.
19	▼	15.8/28	A	Full House
21		15.7/24	A	Growing Pains
21		15.7/25	A	Wonder Years
23	▲	15.6/25	C	Stranger Within
24	▼	15.1/23	A	Who's the Boss?
25	▲	14.8/25	N	L.A. Law
26	▼	14.7/21	A	Amer. Funniest People
27	▼	14.6/22	C	Rescue: 911
28		14.4/22	A	Coach
29		14.1/22	C	Movie: Fatal Image
29	▲	14.1/23	N	Grand
29		14.1/24	C	Knots Landing
32	▼	14.0/22	C	Evening Shade
33	▼	13.9/25	N	Carol & Company
33	▼	13.9/21	A	Head Of The Class
33		13.9/24	A	Perfect Strangers
36		13.8/23	C	Jake And The Fatman
37	▼	13.6/21	N	Fresh Prince Of Bel Air
38	▲	13.5/22	N	Movie: To My Daugher
39	▼	13.3/20	A	Movie: Commando
40		12.9/21	A	Married People
40		12.9/23	A	Tube Test
42	▲	12.7/22	N	Law And Order
43	▼	12.5/23	A	20/20
44	▼	11.8/18	F	The Simpsons
45	▲	11.4/20	A	Going Places
46	▼	11.1/20	C	Dallas
47		11.0/17	N	Dear John
47	▲	11.0/17	A	Father Dowling
49	▼	10.9/16	F	In Living Color
49	▼	10.9/16	F	Married...With Children
51	▼	10.8/19	C	Trials Of Rosie O'Neill
52		10.7/16	N	Ferris Bueller
53	▼	10.4/20	N	American Dreamer
53	▲	10.4/18	A	Primetime Live
55	▼	10.3/17	A	Macgyver
56	▲	10.1/16	C	Flash
56		10.1/16	A	Gabriel's Fire
58		10.0/18	N	Fanelli Boys
59		9.8/17	N	Movie: Night Visions
60	■	9.6/18	N	Amen
61	▲	9.5/15	C	Doctor, Doctor
62		9.4/16	A	thirtysomething
63		9.1/14	C	Top Cops
64		8.4/13	C	48 Hours
65	▼	8.3/12	F	Get A Life
65		8.3/14	N	Quantum Leap
67		8.2/14	C	Evening Shade Spec.
67		8.2/14	N	Hunter
69	▼	8.1/14	C	Over My Dead Body
70	■	8.0/13	N	Working It Out
70		8.0/15	A	Young Riders
72		7.9/13	A	World Of Discovery
72		7.9/15	A	Twin Peaks
74		7.8/13	N	Super Bloopers/Jokes
75	▼	7.4/12	F	Parker Lewis
76		6.7/12	C	Hogan Family
77	▼	6.6/11	F	America's Most Wanted
78		6.1/9	F	Good Grief
79	▼	6.0/9	F	Babes
79		6.0/11	A	China Beach
79		6.0/9	N	Lifestories
79	▼	6.0/10	F	True Colors
83	▼	5.8/9	F	Movie: Working Trash
84		5.7/10	C	Family Man
84	▼	5.7/11	C	Wiseguy
86	▼	5.4/10	C	Broken Badges
87	▼	4.9/9	F	Cops
88	▼	4.6/8	F	Totally Hidden Video
89	▼	4.4/7	F	Beverly Hills, 90210
89	▼	4.4/7	F	Comic Strip Live
91	▼	3.2/6	F	Haywire
92	▼	2.7/5	F	Against The Law
92		2.7/5	F	American Chronicles

FREEZE FRAMES: Syndication Scorecard *

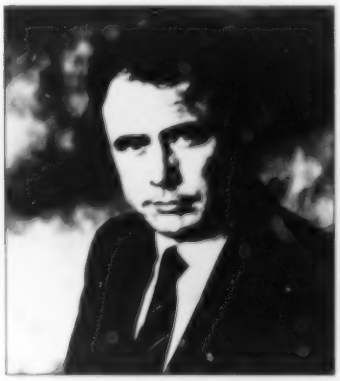
Week ended Nov. 25

Rank	Program (Syndicator)	Rtg	Stns	Covg
1	Wheel of Fortune, syn. (King World)	13.1	220	98
2	Star Trek: Next Generation (Paramount)	12.0	233	98
3	Jeopardy! (King World)	11.6	209	96
4	MGM Premiere Network (MGM/UA)	10.6	160	91
5	Magic I (Buena Vista)	10.0	187	93
6	Entertainment Tonight (Paramount)	8.6	175	95
7	Oprah Winfrey (King World)	8.5	202	95
8	Cosby Show (Viacom)	8.1	200	96
9	Wheel of Fortune, wknd. (King World)	8.0	181	82
10	Current Affair (20th Century Fox TV)	7.8	190	95
11	Ent. Tonight Thanksgiving (Paramount)	7.1	170	95
12	Warner Bros. Prem. Edition (Warner Bros.)	6.8	128	91
13	Donahue (Multimedia)	6.3	224	97
14	Super Force (King World)	5.7	170	94
15	Inside Edition (King World)	5.3	122	77
15	Star Search (TPE)	5.3	169	95

* Nielsen weekly pocketpiece

Source: Nielsen and Broadcasting's own research.

SPECIAL REPORT



Big Business in Any Language

HISPANIC BROADCASTING

Hispanic television and radio is a $480 million-plus business in the U.S. and is growing. In 1990 advertising expenditures in the various Hispanic media grew at a faster rate than those in their English-language counterparts. An important factor fueling the interest and the growth in Hispanic media is the growth of the Spanish-speaking population—roughly 6% per annum—greatly exceeding the national average.

As the population booms and more advertisers come to the table, the problems of defining the Hispanic audience, and measuring it, will continue to pose a challenge for the three ratings services vying for market dominance in TV, The Arbitron Co., Nielsen Media Research and Strategy Research Corp. Nielsen appears to

be inching ahead with the cooperation of Univision and Telemundo, and has already installed peoplemeters, and conducted trial runs.

Radio operators continue to thrive with techniques borrowed from English-language radio. Narrowcasting and niche targeting are terms creeping into the vocabulary, as stations go head to head with mainstream stations—and win—in markets such as Miami, Los Angeles, New York and San Antonio. Birch/Scarborough and Arbitron have expanded their Hispanic rating efforts. What follows is a look at the who, what, when and where of Hispanic communications.

HISPANIC MEDIA: FAMILIARITY BREEDS COMPENSATION AND COMPETITION

Ad revenue for television leaps in 1990; but repeat performance and radio gains in '91 may be harder due to economic 'slump' and new players

As Hispanic media grow, their revenue outlook becomes more similar to that of the larger media community. On the plus side are a wider base of advertisers who have more experience using the media. On the down side are new entrants, further diluting inventory and battling for budgets. Common to all are a week-to-week uncertainty over the bigger economic picture and its effect on advertising.

Fortunately, the advertising budgets allocated to Hispanic media have continued to increase, doing so in 1990 at a rate more rapid than that of their English-language counterparts. As the accompanying chart shows, total dollars spent on Hispanic media were estimated to have grown 7.6% in 1990, to $628.2 million. The growth was most noticeable in television, with national TV drawing a 17% increase and local TV growing by 9%.

Roughly one of every three dollars goes to Univision and its owned stations. President Bill Grimes said that in 1990 the network's revenue was likely to increase 25%-26% over the prior year, while that of the nine owned stations would increase 7%-8%, for a combined increase of roughly 16% over 1989. The strong performance was due in part to the network's telecast of the World Cup soccer matches.

For the number-two network, Telemundo, full-year figures were not yet available, but results for the first nine months ending Sept. 30 were up 28% for operations in the continental U.S.—revenue from Puerto Rico was down—to $55.6 million. National revenue increased faster, jumping 37%, while local revenue was up 12%, with some of the latter gain due to the accounting consolidation of KDVA-TV San Antonio.

Already Univision and Telemundo are beginning to face a third contestant for national television dollars, Galavision, which still, however, draws most of its strength from a few markets in the Southwest. One market source estimated that the Mexican-based network's Los Angeles affiliate, KWHY-TV, took in about $7 million in 1990, more than quadrupling its 1989 revenue—the station became an affiliate in March 1989. Additional competition will come from two cable channels due this spring.

Competition amongst Hispanic media is not necessarily bad, however. Univision's Grimes said that compared to January 1989, the total Hispanic stations' share of viewing has doubled to 12%. Thus the success of KWHY-TV may be additive. In print, the advantages of competition may be more apparent with the launching of additional consumer magazines helping make it worthwhile for advertisers to produce print ads.

Not everyone agrees with the published estimate of 7% growth for national radio: Gene Bryan, vice president, national sales manager of Katz Hispanic Radio Sales, said he thought growth was somewhat lower.

Continued growth in Hispanic media revenue overall is due to a number of factors. One of the most important is population growth, which at roughly 6% per annum over the past five years greatly exceeds the national average. Media are also continuing to market better to advertisers, helped in part by better research (see story, page 76). Noticeable among new advertisers in 1990 were Japanese-based auto manufacturers such as Honda, Mazda and Nissan. Also some of the newer national media, such as Telemundo, are continuing to expand their reach.

The backdrop to all the good news is an economic deceleration. As of yet those contacted last week were not revealing the same pessimism about 1991 revenue as their English-language counterparts. For instance, Laura Marella, media director of ad agency, Casanova Pendrill Publicidad, said: "Historically, we have been dismayed to know that when advertising budgets were cut, the first thing to go was the Hispanic budget. So far this year I can't say that we have seen that and in some cases our Hispanic budget is increasing a little." But many commenting did not take continued growth for granted. Said Katz

WHERE THE MONEY COMES FROM
Top Hispanic advertisers

Procter & Gamble	$29.8 million
Philip Morris	$8.7 million
Anheuser-Busch	$8.6 million
Sears, Roebuck & Co.	$8.2 million
Colgate-Palmolive	$7.6 million
McDonald's	$7.3 million
Coca-Cola	$6.6 million
Ford Motor	$5.2 million
Adolph Coors	$5.1 million
Burger King	$4.8 million

WHERE THE MONEY GOES
(in millions)

	1989	1990	% chg.
National TV*	$121.6	$142.8	17.4
National Radio	51.5	55.1	7.0
Local TV	120.5	131.1	8.8
Local Radio	149.3	156.0	4.5
Print	57.2	58.9	3.0
Outdoor	17.3	17.0	-1.7
Promotion	61.6	63.6	3.2
Transit	4.6	4.2	-8.7
Total	$583.6	$628.2	7.6

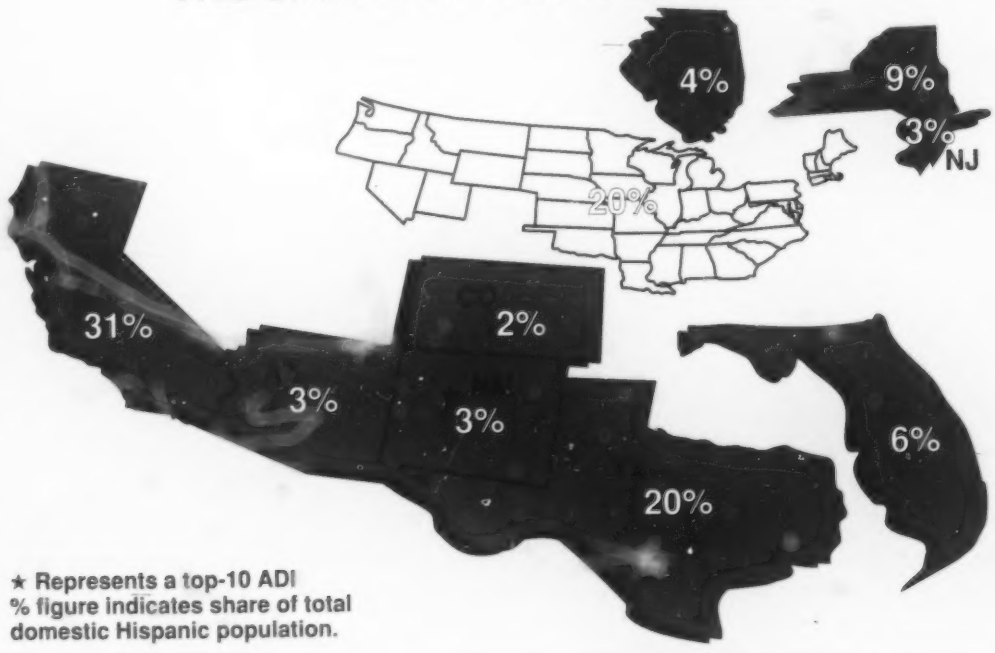
**Estimates for both years include Galavision, which in 1989 was in separate category from National.*
Estimates courtesy of Hispanic Business.

Hispanic's Bryan: "We are projecting minimal radio growth but are optimsitic for the second half of the year."

Univision's Grimes was relatively optimistic about 1991, predicting 10% growth for the stations and the network. Both Univision and Telemundo, and presumably Galavision, are still short of selling all their inventory, which tends to keep unit prices lower and should theoretically help Hispanic television networks in a weak economy. Grimes said that Univision typically had several minutes of commercial time per hour that could be sold above and beyond what is currently sold.

Even if the current economic "slump" does not reduce total dollars going to Hispanic media, it may alter those dollars' allocation. Elsa Saldana, vice president, media director, for ad agency Mendoza Dillon, said she wouldn't be surprised if there was a shift in television spending from network to spot: "Although Hispanic networks are very efficient, they also require higher out-of-pocket costs. You may see some advertisers economizing by covering just two or three markets rather than going with a national plan covering the top 20-30 markets." –GF

THE SHAPE OF HISPANIC U.S.A.



★ Represents a top-10 ADI
% figure indicates share of total domestic Hispanic population.

MAJOR HISPANIC GROUPS IN THE TOP-10 ADI's *

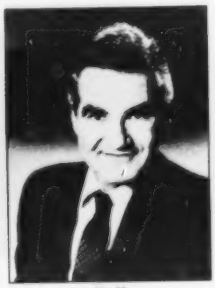
ADI Hispanic Population	% of total pop	
Los Angeles 4,205,100	31%	KMEX-TV Univision KVEA-TV Telemundo KWHY-TV Harriscope KSKQ-AM-FM Spanish Broadcasting System KTNQ(AM)-KLVE(FM) Heftel KWKW(AM) Lotus
New York 2,569,700	14.2%	WNJU-TV Telemundo WXTV(TV) Univision WADO-AM Tichenor WSKQ-AM-FM Spanish Broadcasting System
Miami 929,900	29.2%	WLTV(TV) Univision WSCV-TV Telemundo
		WQBA-AM-FM Tichenor WCMQ-AM-FM Spanish Broadcasting System WAQI(AM)-WXDJ(FM) MambisaHeftel
San Antonio, Tex. 863,600	52.2%	KVDA-TV Telemundo KWEX-TV Univision KCORO(AM) Tichenor KRNS(AM)-KZEP(FM) Lotus
Chicago 852,600	10.4%	WSNS-TV Harriscope WIND(AM)-WOJO-FM Tichenor WTAQ(AM) Lotus
San Francisco 752,200	15.2%	KDTV(TV) Univision KSTS-TV Telemundo
Houston 720,300	18.7%	KTMD-TV Telemundo KLAT(AM) Tichenor
McAllen-Brownsville, Tex. 599,600	87.2%	KGBT(AM)-KIWW(FM) Tichenor KIRT(AM)-KQXX(FM) Gomez
Albuquerque, N.M. 539,500	39.8%	KLUZ-TV Univision KABQ(AM) Gomez
El Paso, Tex. 492,900	67.9%	KBNA-AM-FM Tichenor

* Population figures from Arbitron: persons two-plus in TV homes and group quarters. Major group is defined as operator having two or more stations in top-10 markets. Area of Dominant Influence reflects television markets; radio markets are generally the same—although not necessarily in same order—but San Diego is listed as 10th market while Albuquerque is listed as 16th-largest. Does not include low-power television.

'MAINSTREAM' TELEVISION IS STILL CHANGING COURSE

Some English-language outlets reach for Hispanic audience; but effort is not without risk and revenue lags behind

Lobo


Bell

Pearson

Cuddihy

Cancela

One indicator of the strength of Hispanic media is the restraint of their English-language counterparts in servicing Hispanic viewers. The amount of Spanish-language programing on English-language stations has increased—in part due to second audio program (SAP) channel capability—but most stations still do no simulcasting. In some markets such programing has declined as Hispanic media has grown to meet the needs.

Even so, there are some English-language stations experimenting and increasing their commitment to the Hispanic audience. One of the most aggressive such stations is KTLA-TV in, not surprisingly, the country's largest Hispanic market, Los Angeles. Having begun simulcasting over the SAP six years ago, the Tribune-owned independent now has a full-time translator and simulcasts 22½ hours per week in English and Spanish, including its 10 o'clock newscast, 55 California Angeles baseball games and such syndicated fare as *Loveboat*, *Airwolf* and *Columbo*.

KTLA-TV's general manager Steve Bell said many of the syndicated shows simulcast come from MCA, which, he said, is "the most progressive of all syndicators in this area." Bell also noted that cable systems seem to be passing through the SAP signal.

In a smaller market—but one whose ADI is two-thirds Hispanic, El Paso, Tex., KVIA(TV) also offers some simulcasting on Sunday morning of *A-Team* and *Knight Rider*. KVIA's effort, said its general manager, Richard Pearson, is helped by the increasing percentage of TV sets capable of receiving the SAP channel and by a grant from the Department of Education that has helped fund "real time captioning" of the station's 6 p.m. news.

Simulcasting can also be done on a national level. HBO has done so with its two-year-old *Selecciones en Espanol*, which provides Spanish-language dubs for many films and HBO original programing, including its documentaries and boxing events. Carried by about 180 cable systems, *Selecciones* has coverage by 80% of the operators who have large Hispanic populations, according to Concepcion Lara, director of new business development.

The service, which provides a Spanish audio to HBO programing, can be accessed primarily through the SAP channel, according to Lara. Several Los Angeles systems have made access simpler by putting *Selecciones* (both audio and video) on a separate cable channel.

HBO continues to refine the service and is conducting tests in Miami, Los Angeles and New York to judge how well *Selecciones* marketing efforts are performing. But HBO has little idea just how many Hispanics the service is reaching, since HBO subscribers don't have to pay extra to access *Selecciones*.

But simulcasting and other direct pitches to Hispanics still seem to be the exception. Most of the English-language stations contacted by BROADCASTING said the Hispanic population was being adequately served by Spanish-language stations, especially with news and public affairs programing. A spokesperson for WCIX(TV) Miami said the CBS-owned station has no programing specifically geared for the important Hispanic community there: "Spanish-language people are already very well served."

The cable community is starting to reach out to Hispanic markets, and has the power to do so effectively given cable's regional focus. San Antonio's Paragon Cable, owned by KBLCOM, has had the franchise for 15 months, taking over a situation where "for years there was not a lot of Hispanic involvement or marketing," said T.J. Connolly, director of public affairs. So Paragon, in the fall of 1989, began to aggressively court their Hispanic population by both getting involved in community affairs and marketing directly to the Hispanic consumer. Cable penetration of the Hispanic community is between 35% and 40%, and "we feel it should be 50% or 60%," said Connolly.

To attract this market, Paragon has produced specialty programing for the Hispanic audience and plans to create a bilingual Hispanic affairs show scheduled to debut next summer. The system has also involved itself on a grass roots level, from establishing minority scholarship programing to attending Hispanic parish festivals, said Connolly.

Paragon has also instituted a tier of service below its 30-channel, $18.30 package. Specifically targeted to Hispanic consumers, but not exclusively so, the $14.95, 20-channel package has channels to attract Hispanic audiences. In addition to two Spanish-language broadcast channels, services such as Nickelodeon and The Nashville Network, which do well with Hispanic consumers, are on the 20-channel tier of services.

A survey of stations in New York, which has more than 2.5 million Hispanics, indicates that English-language stations typically serve that community with a weekend public affairs show. WNBC(TV) has a half-hour public affairs show on Sunday called *Visiones* which airs just after a similar offering on WABC-TV called *Tiempo*. WWOR-TV has an hour-long show, Hispanic *Horizons*, aired every other Sunday while WPIX-TV has aired public service announcements targeting the Hispanic community, in-

cluding one on AIDS that was entirely in Spanish. A spokesperson for WNYW-TV said its news magazine, *The McCreary Report*, covers Hispanic and other minority affairs during the weekly one-hour airing.

In addition to public affairs shows and extended coverage of some community festivals, English-language stations also have made efforts to expand their news distribution, short of simulcasting on the SAP. KHOU(TV) Houston, for instance, has an arrangement with Spanish-language KXLN-TV for the latter to excerpt and rebroadcast video portions of KHOU-TV's newscast.

The most common efforts, such as language and information programing, by no means define the totality of the "Anglo" effort. Some stations, of which WTVJ-TV Miami is probably the best-known example, are pursuing Hispanic viewers through other means, such as promotion, personnel and entertainment programing.

The NBC-owned station's general manager, Dick Lobo, said WTVJ-TV is reaching out to the English-speaking children and grandchildren of Cuban immigrants. Among the many ways to reach that group, he said, are placing ads for the station in Spanish-language newspapers, on Hispanic radio stations that have "crossover" music and on billboards in neighborhoods of "bilingual communities." The station also sponsors several community festivals.

Even entertainment programing is selected with Hispanic viewers in mind. Lobo, whose own ancestors are Cuban, said the station runs "reality" shows such as *Current Affair*, *Entertainment Tonight*, *Personalities* and *Hard Copy* in access: "A lot of Latins, I think, like gritty news." At KVIA-TV, Pearson said that sitcoms such as *Cosby* or *Night Court* "work very well."

In the personnel area, WTVJ-TV has hired as anchors Jose Diaz-Balart and Theresa Rodriguez; both had formerly worked for the Spanish International Network. Because other English-language stations have also hired Hispanics, there has been a bidding war for on-air talent in some cases, according to Jose Cancela, general manager of Miami's Univision affiliate WLTV(TV).

Commitment through hiring is also evident at KVIA-TV El Paso where 73% of the station personnel have a Hispanic surname, and at Capital Cities/ABC-owned KFSN-TV Fresno, Calif., where both primary anchors and the program director are Hispanic. Said the latter's general manager, Marc Edwards: "To be responsive to the community is to have people working here who are responsive."

Advertising may be a key in determining how much effort most English-language stations put into attracting the Hispanics in their communities. In Los Angeles, some advertisers that traditionally used Hispanic media have recently tried KTLA-TV, a VHF independent. In addition, said Bell, one advertisement, from the California Rice Producers, may have been the first local ad produced in both Spanish and English.

But at least on a national basis, it has been difficult for English-language stations to tap budgets intended for reaching Hispanics. John Cuddihy, head of Katz Hispanic TV sales, said that as a result, most of the efforts cited above have been limited to "specialized situations along the border. The opportunities are not as good as initially thought." Katz recently made an effort to form an unwired network of English-language stations reaching Hispanic audiences but found a jurisdictional dispute. Said Cuddihy: "Hispanic agencies have a mandate to put the money in Hispanic media while the other agencies don't have Hispanics in their target demographic."

In addition to revenue concerns, another disincentive for English-language stations to acknowledge the Hispanic audience may be the reaction of their "Anglo" viewers. In some markets, such as Miami, where language has become a political issue, a station that programs, hires and otherwise tries to reach Hispanics may incur some negative reaction. Said Lobo: "I have been told that if we appear to be pandering to Hispanics we will lose some white viewers and I hate to admit it but there has been a little backlash. Still, I have to do what I think is right for the intelligent and thinking people." Said Cancela: "My contention is that the more they [WTVJ-TV] do to attract Hispanics, the more they will alienate their core viewers." GF

BIRCH, ARBITRON MOVE TO IMPROVE HISPANIC COUNT

Arbitron has revised diaries and Birch has intensified language training for interviewers as part of effort to better record Hispanic audiences

Measuring the Hispanic radio audience continues to provide a challenge for both Arbitron and Birch, including such issues as diary completion/retrieval, telephone sample size and subgroup representation.

As the U.S. Hispanic population continues to grow, and as more marketers begin to target the consumer loyalty exhibited by this segment of the population, the Hispanic radio listener has become increasingly valuable to radio stations and advertisers alike. As a result, both services have undertaken extensive research to determine methods by which they can maximize their Hispanic sampling, thus insuring a more accurate picture of market-by-market Hispanic audience listening.

Arbitron Director of Research Jim Peacock told BROADCASTING that the two fundamental challenges in measuring the Hispanic audience were obtaining adequate cooperation from the respondents and retrieving good quality data from them. To this end, Peacock said, Arbitron—in its last three surveys—has achieved levels of Hispanic representation "at or above their proportion in the general population in the market." This percentage of "in-tab" diaries obviates the weighting of Hispanic diary returns and, theoretically, yields a more complete profile of Hispanic listening. "We're at a very good level of cooperation and representation, to the degree that the Hispanic population now is cooperating to the same degree as the general population," Peacock said.

Cooperation and representation yield quantity, but achieving quality within that cooperative sample "is a bit trickier," acknowledged Peacock, who questioned whether any particular method captures all possible radio listening. "In our diary measurement, we see levels of Hispanic listening anywhere from 15%-20% higher than we see for the general population, and much more than is reported by the other service regularly measuring local market radio." Peacock said that Hispanic broadcasters are more inclined to believe (or at least endorse) the higher numbers, but he said that trying to prove that either company's numbers are too low or too high is "impossible."

To achieve today's current Hispanic cooperation, Arbitron has substantially revised its diary, including a bilingual

diary that is mailed to each Hispanic household as soon as that household is so identified. Arbitron also has reviewed its Hispanic translations of diary instructions in order to "ensure the best possible understanding of our bilingual materials." He said that, in any given Hispanic household, "you have a mixture of people regarding primary language." Because Arbitron samples all members of the household, "we don't want to oversimplify the process and assume they all speak one language," Peacock explained.

Peacock also credits Arbitron's Differential Survey Treatment with helping to achieve better diary returns. "We introduced DST in 1980, and it's been enhanced and refined several times since then," he noted. Aside from the bilingual materials, DST uses higher per-person diary premiums in the known Hispanic sample, and we make additional follow-up calls. Typically, a nonethnic household would receive one call from Arbitron at the beginning of the survey week, whereas a known Hispanic household will receive three—one at the beginning, one in the middle of the week, and one immediately following the completion of the survey "to remind them to send it back." Also, during the survey week, Arbitron mails a follow-up letter with an additional premium enclosed. "It's a package of more intensive treatments that's proven itself in testing and in practice," Peacock said.

Possibly compounding diary retrieval is the difference between specific Hispanic subgroups, such as Cuban, Puerto Rican and Mexican, and rural and urban Hispanic populations. Peacock said that determining the subgroup is difficult because "it's intrusive to ask a respondent about origin beyond whether they are Hispanic or not." Market-by-market differences (and even those between rural and urban areas in the same market) are noticeable—and treated accordingly. For example, the Miami Hispanic population tends to be more cooperative than that in McAllen-Brownsville, Tex., which results in a closer survey monitoring model and slightly higher follow-up premiums, Peacock explained. Also, Arbitron subdivides some Hispanic markets into High-Density Hispanic Areas to look specifically at the Hispanic population overall, as well as within ZIP codes known to have a high proportion of Hispanic population.

Birch/Scarborough's call-out methodology continues to produce criticism that it undersamples the Hispanic population because Hispanic households are more likely not to have a phone than the general population, thus causing the company to miss a large segment of the population. To determine the scope and severity of this problem and to understand better other characteristics of the Hispanic radio audience, Birch earlier this year studied nonrandom convenience samples of the Hispanic population in Miami and San Antonio (BROADCASTING, Dec. 3). "We wanted to see how we could enhance the information we were getting, or determine any roadblocks that respondents were perceiving that maybe we didn't see," explained Patricia Gawle, Birch Hispanic Market Specialist.

The study revealed that some 16% of the San Antonio respondents and 8% of the Miami respondents were from nontelephone households, and typically had less education than those from telephone households. Still, Birch cited a 1988 study that observed little difference in weekday radio listening levels in either telephone or nontelephone households, although nontelephone household listening was heavier than telephone household listening on weekends.

Hispanics also often are more reluctant than the general population to answer questions in a survey, Gawle said. "The Hispanic mindset tends to be different, more hesitant," she noted. "Some members of the household may not be exactly sure of their legal status, and they might be apprehensive answering questions that sound suspicious. We wanted to see what we could do with our interview to make respondents feel even more comfortable with it." Gawle said the study revealed few problems understanding the interview terminology and very few objections regarding the questions themselves. "What we did get out of it were some of the reasons why they might be apprehensive, which we have built into our training classes," she said.

To ease this possible respondent apprehension, Birch has intensified training so that bilingual interviewers can try to make a respondent more comfortable with the questionnaire; instruction is provided by a primary Spanish speaker. The company also has refined the wording of the interview script so it could be better understood by different Hispanic subgroups.

As a result of this continued testing, Birch has increased the number of interviews conducted in Spanish. Said Gawle, "Since December 1989, all our [Hispanic Target Market Report] buffer samples are initiated in Spanish, which has led to a dramatic increase in the number of interviews we have in Spanish." Monthly language tracking of all HTMR interviews shows that some 71% of all Hispanic interviews currently are conducted in Spanish."

Despite the research studies and subsequent improvements in methodology, radio advertisers still are less than satisfied with Hispanic measurement, says George Rivera, director of CBS Hispanic Marketing.

Because of these doubts, CBS Hispanic Radio this fall conducted its own national audience research of Major League Baseball championship and World Series Spanish language broadcasts.

Janet Therrien, director of research at Katz Hispanic Radio in New York, says she is "extremely encouraged" by the steps Birch has taken to divide the Hispanic market into primary language segments. Therrien said this attempt parallels the "assimilated, partially assimilated, and nonassimilated" subgroups that Hispanic agencies for years have assigned to the Hispanic market. "Until now, neither Birch nor Arbitron has looked at the language issue, so Birch is taking a preliminary step in the right direction," she noted. "This gives advertisers and agencies information that is more in line with what they need, and takes them a step closer to the market. For advertisers who are considering going into Spanish but are a bit scared, this answers some of their questions."

Interep Radio Store's Director of Research Ray Hockstein termed Birch's and Arbitron's current efforts "adequate" because both services recognize the difficulties in measuring the Hispanic audience and are "attempting to rectify the problems that exist." -HEB

DEFINING THE U.S. HISPANIC AUDIENCE

Demographic	*Population*	*% of total*
Males 18-24	1,752,100	7.4%
Males 25-34	2,320,400	9.8%
Males 35-49	1,870,500	7.9%
Males 50-54	355,200	1.5%
Males 55+	1,231,200	5.2%
Females 18-24	1,562,700	6.6%
Females 25-34	2,249,400	9.5%
Females 35-49	1,941,500	8.2%
Females 50-54	402,500	1.7%
Females 55+	1,444,300	6.1%
Teens 12-17	2,888,700	12.2%
Children 0-11	5,658,900	23.9%
Total Persons	23,677,800	100.0%

Source: Strategy Research Corp.'s 1989 Hispanic Market study.

TRACKING HISPANIC VIEWING IS A THREE-WAY RACE

Arbitron, Nielsen and Strategy Research Corp. take different approaches to the difficult job of measuring Spanish-speaking audiences

Defining the Hispanic television audience, much less measuring it, is proving to be no easy task for the three ratings services fighting it out to be the definitive source for information on Hispanic viewing habits.

The Arbitron Co., Nielsen Media Research and Strategy Research Corp. (SRC) rely on diaries, peoplemeters and traditional face-to-face surveys, respectively, for information on the local viewing of Hispanic stations and/or national viewing of Hispanic networks. Finding out specific numbers of Hispanic households or persons using television is only half the battle for these ratings services. The networks, reps and ad agencies also want to know how assimilated the audience being measured is with the general audience.

With Nielsen testing a national Hispanic audience measurement service, it appears to be gearing up to be the Hispanic media measurement system of choice for the next decade. Although results so far have been positive, it has by no means been an easy task for Nielsen, according to some Hispanic network research executives.

Nielsen announced last year that with sponsorship from Telemundo Group Inc. and Univision Holdings Inc. it would develop a national Hispanic television service to start next year. The two Hispanic networks put up $38 million to get the national service off the ground. Nielsen installed peoplemeters in 200 households in Los Angeles last July and the findings confirmed that the Hispanics represented in the general survey were not indicative of the majority of Hispanic viewers included in the general survey.

Among the findings:

- Hispanic households viewed more television than the general population in the Los Angeles market.
- In prime time, 61% of Hispanic households had their TV sets on compared to 54% for the entire market.
- Daytime TV usage among Hispanic households was also higher—44.5%—compared to 31.3% for the market.

More important, Nielsen's Hispanic household-only study also found that half of the Hispanic households in the Los Angeles market speak only or mostly Spanish. Only 22.6% speak both Spanish and English and only 24.5% speak mostly English. Also, 63.5% of Hispanic households have four or more persons; 29.6% subscribe to cable and 71% own VCR's.

Ceril Shagrin

Nielsen

The second set of findings seems to prove that Nielsen's general Los Angeles sample, which includes 20% to 25% of Hispanic viewers, is skewed more towards the assimilated Hispanic market and not representative of the Hispanic community as a whole.

Trying to get non-English speaking homes to be part of Nielsen's peoplemeter survey has probably been no easy task and that makes some Spanish network executives glad.

Said Peter Roslow, vice president, research, Telemundo: "So far the results have been encouraging. Nielsen found it to be a difficult job, which is wonderful news. If it had been easy," that would have shown that the regular service was accurate. The point, Roslow said, is that Nielsen "never really focused on this market, therefore the Hispanic sample is not a very representative group." The regular sample, Roslow added, may seem to be fairly representative on the surface, but when one digs deeper, it becomes apparent that the regular Hispanic sample is more English-oriented.

Compared to Nielsen's peoplemeter, SRC's face-to-face canvassing of the Hispanic market must seem like a throwback to the days of door-to-door pollsters.

Strategy Research Corporation®

Miami-based SRC started tracking the Hispanic audience in 1977 at the request of a Los Angeles TV station. The ratings service conducts three surveys a year—two local market reports and a network report—in 33 markets. Interviewers ask viewers about the previous day's viewing. According to Terry D'Angona, vice president, media, the door-to-door survey does a better measuring the non-English speaking Hispanic audience. "We are the only Hispanic research company that has its own field staff. Our interviewers approach households and start speaking Spanish." "We find face-to face is much better. It fits more into the culture. The other thing is that the face-to-face interview is as old as research. It was abandoned in the general market because it is so expensive. With Hispanics, it is still the best in getting results," she said.

Arbitron also relies on bilingual interviewers and has increased incentives for Hispanic homes being measured. "We use incentives because the households tend to be larger," said Arbitron's Doug McFarland. The ratings service also provides diaries in both Spanish and English for households where both languages are spoken fluently. And, although SRC interviews Hispanic-only households because it says Nielsen and Arbitron skew results, Arbitron argues that by limiting itself primarily to Spanish-speaking only families, SRC is also skewing its methods.

Although Hispanic media executives probably feel some loyalty to SRC because of its long-term relationship with the industry and its personal approach, most seem to be betting with Nielsen and will probably support its national peoplemeter plan at the expense of SRC and Arbitron. "In theory, SRC has the best methodology," said Telemundo's Roslow. "But," he added, "it is hard to get good interviewers out there and

it is difficult to control the [interviewer] turnover."

Also, advertisers and media buyers are not bilingual when it comes to hard numbers. Hispanic media executives know that it is to their advantage to use the same methodology as the general media. Said Milagros Carrasquillo, Univision director of research: "As far as meters go, we want to see Hispanic peoplemeters. We want to be measured by the same barometer as the general market...advertisers want hard numbers and they measure everyone by the same yardstick.... We can only achieve our share of ad budgets with the peoplemeter; that's why we approached Nielsen."

Reps who work with Hispanic media echo Carrasquillo's thoughts. Said John Cuddihy, director of sales, Katz Hispanic Television: "The emergence of Nielsen has made a lot of people stand up and take notice. The belief that if this test is successful it will generate money for the Hispanic marketplace is probably correct." That does not mean that Cuddihy, or other industry executives, underestimate the value of SRC. "Nielsen will have to find trust in its audience; SRC still has a wonderful edge with its field reps."

Doug McFarland

ARBITRON

Nielsen and its clients know that there is still work to be done. According to Roslow, the persons-using-television (PUT) numbers are quite low. "On the surface," Roslow said, "we attribute that to people not pushing buttons...[but] the composition [of the Hispanic household] changes so dramatically and quickly and it is difficult to keep up." As an example, Roslow pointed to one household Nielsen found that had two people living in it. When the ratings service went back six weeks later, there were 14 people living in the house. "The base is changing so quickly it, we think, is playing havoc with PUT levels." Nielsen offers peoplemeters with eight buttons on it and 16 buttons depending on household size, and 50% of the homes wired for the test run have 16-button meters.

"Doing it right is not easy," said Ceril Shagrin, senior vice president, Nielsen Media Research. Shagrin, who is overseeing Nielsen's Hispanic effort, said that just gaining cooperation was a major problem. Said Shagrin: "The people we approached were not aware of ratings, what they are, or what Nielsen is. We had to gain their confidence and explain what we were doing and why it was important to them and to us. Also, trying to determine who is a household member or a visitor is a problem." –#

the media institute

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1990 HISPANIC JOURNALISM AWARDS PROGRAM

Iván Román, *El Nuevo Herald*
"SIDA en Puerto Rico"
Best News Article
in Spanish

Diana Martinez, *Hispanic* Magazine
"Where to Draw the Line"
Best News Article
in English

Maribel Hastings, *La Opinion*
"Escuela en los Reformatorios"
Best Feature Article
in Spanish

Zita Arocha, *Vista* Magazine
"Education Secretary Lauro Cavazos: Failing the Test"
Best Feature Article
in English

Hector A. Feliciano, WNJU-Channel 47
"Se Desploma Edificio en Brooklyn"
Best Spot News Coverage
—Local TV Station

Carlos Verdecia, Univision
"Adios a Las Armas"
Best Spot News Coverage
—TV Network

Denisse M. Oller, WXTV-Channel 41
"Puerto Rico—Futuro Incierto"
Best Continuing News Coverage
—Local TV Station

Marlene Fernandez, CNN Spanish-Telemundo
"Es Cuba la Proxima"
Best Continuing News Coverage
—TV Network

Samuel Orozco, Araceli Garcia, Gunnar Jensen, KSJV
"Investigacion de la Muerte de Ismael Ramirez"
Best Continuing News Coverage
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'Sabado Gigante'

'Yo Compro Esa Mujer'

'Cristina Show'

SAMPLING HISPANIC TELEVISION SHOWS

■ Univision's *Sabado Gigante* (*Giant Saturday*) remains the number-one show on Hispanic television in the U.S., attracting a 45 rating during the spring 1990 Strategy Research Corp. survey (figures for the more recent November sweeps period were not available at press time). The weekly three-hour variety/game show, hosted by Mario (Don Francisco) Kreutzberger, features in-studio audience participation and frequent sponsor tie-ins.

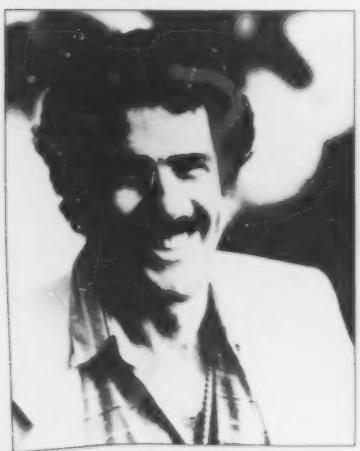
■ Univision's *Desde Hollywood*, hosted by Luca Bentivoglio, routinely draws high ratings for the network on Tuesday nights at 10 p.m. The chatty entertainment news show has featured guests including Sting, Julio Iglesias, Andy Garcia, Bruce Willis, and Robert Redford, among others. Bentivoglio domestically produces *Desde Hollywood* as well as Univision's *Tu Musica* and *Fama y Fortuna*.

■ Cristina Saralegui's Miami-based topical afternoon talk show, *Cristina*, often referred to as the Hispanic *Oprah*, has scored high ratings since debuting more than a year ago on Univision. *Cristina* was the number-eight show among all households in the spring 1990 Strategy Research Corp. survey, and ranked even higher among women age 18-plus.

■ Univision's three-hour *Nuestra Belleza* (*Our Beauty*) has ranked as the number-one special on Hispanic television, based on Strategy Research Corp. studies commissioned by the network. The annual beauty contest, which originates live from the James L. Knight Convention Center in Miami, features 24 Hispanic contestants from around the country in various competitive categories. The third annual competition is scheduled for Oct. 24, 1991.

■ Univision has scored a big hit this season with its just-completed novela, *Yo Compro Esa Mujer* (*I Buy That Woman*). Novelas, melodramatic Hispanic soap operas, regularly rank high among viewers. Other novelas currently on the network include *Amanda Sabater*, *Mi Pequena Soledad* and *Pobre Diabla*, starring popular Venezuelan actress Jeanette Rodriguez.

■ Movies frequently rank among the



'El Magnate'

'Charytin'

'The Cassandra Cross ng'

'Qué Pasa'

top-rated programs on Hispanic television, with Telemundo's *Cine Millonario* among the highest rated. Offerings during the 1990-91 season include *Sophie's Choice* and 83 other popular titles acquired through a licensing agreement with ITC Domestic Television earlier this year. The dubbed titles are being added to the line-up of mostly Mexican-made films which have traditionally earned high ratings in the Monday-Friday prime time (*Cine Millonario*) and Sunday prime time (*Cine Mundo*) slots.

■ Popular Latin personality Charytin Goyco has managed to earn high ratings for Telemundo since launching her musical variety show, *El Regreso De Charytin*, on the network in 1987. The weekly program, produced in Puerto Rico, airs Sundays from 7 to 8 p.m. and features the entertainer's many performing talents. Other variety shows on Telemundo include *The Carlos Alfredo Show*, *Marcano...El Show*, *Su Estrella Favorita* and *Sabado Noche*.

■ *Ocurrio Asi* (*It Happened This Way*) has been attracting respectable overnight ratings since its debut earlier this season on Telemundo. Stories on the half-hour news magazine show have been of the *A Current Affair* variety, such as an exploration into the secret rituals of Santeria, a form of religion, and the first transsexual wedding in Spain. The show is hosted by former KVEA-TV Los Angeles News Director Enrique Gratas and is produced by Telemundo Productions, Hialeh, Fla.

■ In one of its latest outings in the popular novela format, Telemundo's *El Magnate* presents what is billed as a "saga of the complex struggle for power, love and glory." The novela, produced domestically, stars popular Hispanic actor Andres Garcia along with Rudy Rodriguez and Laura Fabian. Other network novelas include *Paraiso*, *Alma Mia*, *La Intrusa*, *Pasionaria* and *La Revancha*. *El Magnate* airs Saturday from 6 to 8 p.m.

■ *Un Rostro en mi Pasasdo* (*A Face in my Past*), starring Eduardo Linan and Sonia Infante, is one of Galavision's top-rated novellas. The show, one of several novellas presented by Galavision, airs Monday through Friday at 7 p.m. Novellas aside, the network scores some of its highest ratings for its movies and sports programing, including two hours of wrestling on Sunday afternoons and boxing on Saturdays at 11 p.m. –RB

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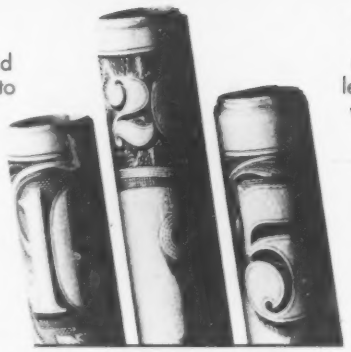

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GETTING BROADER REACH WITH NARROWER AUDIENCE

New formats evolving as narrowcasting techniques are adopted; industry segment stands to benefit from general market expertise

Tune your radio to a Spanish radio station, and you are liable to hear any one of at least 10 distinct formats, as divergent as News/Talk to Country (ranchera) to Top 40 radio. Although the varied formats within the Spanish broadcasting umbrella have existed for as long as there have been Spanish-formatted stations, over the last few years, the diversity of programing has increased and the concept of narrowcasting has crept into the marketplace.

Among the handful of companies involved in Spanish language radio since the late 1940's is Bethesda, Md.-based United Broadcasting. Bill Parris, executive vice president, oversees the operation of the company's two Spanish outlets, KALI(AM) San Gabriel, Calif. (Los Angeles) and WKDM(AM) New York. "Spanish radio is one of the most exciting frontiers in radio," Parris said. "In the last 10 years alone, it has covered the same distance as general market radio has in the last 40."

While general market radio has embraced the fragmentation of radio formats and the development of specialized research and marketing tools, Spanish radio has evolved at a slower pace, Parris believes.

"The first layer of improvement came when Spanish radio operators began to apply general market CHR formatics to their radio stations," Parris said. "By the late 70's and early 80's, every number one Spanish station in the top markets had general market format structures on the air." The last two years have seen the introduction of the research and promotional techniques, and brought Spanish radio to where general market radio was about five years ago, he added.

One of the advantages Spanish radio operators have, in Parris' estimation, is the ability to learn from the mistakes made by the general market broadcaster. "The excitement, to a certain extent," he said, "is that you can relive the general market progression with the benefit of hindsight." Another factor in their favor is that most stations still attract a broad enough audience to deliver solid results for the advertisers.

As far as advantages go, Raul Alarcon, president, Spanish Broadcasting System (SBS), believes that being Hispanic has given his group the edge. SBS was launched with the purchase of WSKQ(AM) in October of 1983. "There are advantages that spring from the fact that we are Hispanic ourselves," Alarcon said. As an example, he cites the New York market at the time they purchased WSKQ(AM). "There were two radio stations, one serving the older listener and one the younger," he said. "We felt that there was a void for contemporary, international Hispanic music. We programed for that void and the success of that venture has been the fuel behind the growth of our company."

The success of relative newcomers such as SBS has been the driving force behind the fragmentation of the Spanish market, said Alarcon. It has been fueled by the continuously shifting immigration patterns into the United States. Looking at a market such as New York, for example, the last few years have seen a growth in the Dominican community, the Salvadoran community and Central and South American communities. Any operator attempting to service the market has had to fine-tune the programing to include news and music representative of the varied ethnic subgroups within the broader Hispanic population.

Tichenor Media Systems has been serving the Hispanic audience since the late 1940's. "In the early 1980's, we were fairly diversified as far as our holdings were concerned, different formats and different media," said Mac Tichenor, president, "and we decided that we would concentrate on Spanish radio."

Tichenor believes that the market is moving very slowly toward fragmentation, if at all. "The formats were always there," he said, "WQBA(AM) Miami has been a News/Talk forever. I am not aware of a dramatic move into fragmentation or narrowcasting in the Spanish market."

Overall, the operators expect to see the radio segment of the Hispanic media increase in competition as more mainstream broadcasters come to the medium and as the population increases. In the long term, improvements in audience measurement techniques and lessons learned from the general market both bode well for the Spanish radio operator. -LC

BIRCH NATIONAL HISPANIC FORMAT RATING AVERAGES BY DEMOGRAPHICS, SPRING 1990

Format	*Number of stations*	*12-17*	*18-24*	*25-34*	*35-44*	*45-54*	*55-64*	*65+*
Contemp. intl. hits	**AM's: 8**	**1.3**	**12.6**	**39.7**	**21.4**	**13.6**	**6**	**5**
	FM's: 17	**7.5**	**19.3**	**31.3**	**24.3**	**10.1**	**5.6**	**1**
Ranchera/cont. Sp. hits	**AM's: 16**	**3.3**	**14.3**	**29.1**	**17.4**	**11.6**	**17.2**	**7**
	FM's: 3	**16.7**	**20.5**	**28.1**	**4.8**	**11.4**	**13.8**	**4**
Ranchera/nortena	**AM's: 16**	**2.1**	**11.1**	**34.8**	**15.8**	**14.9**	**12.6**	**8**
	FM's: 1*	**—**	**—**	**—**	**—**	**—**	**100**	**—**
Ranchera	**AM's: 2***	**—**	**2.4**	**18.6**	**37.1**	**25.6**	**16.3**	**—**
	FM's: 1*	**—**	**5.3**	**31.6**	**15.8**	**42.1**	**—**	**5**
Nortena	**AM's: 1***	**4.3**	**21.7**	**52.2**	**17.4**	**—**	**4.3**	**—**
	FM's	**—**	**—**	**—**	**—**	**—**	**—**	**—**
Chicano	**AM's: 3**	**—**	**8.8**	**21.5**	**23.4**	**13.8**	**29.5**	**2**
	FM's: 1	**—**	**4.8**	**42.9**	**33.3**	**9.5**	**4.8**	**4**
Tex Mex	**AM's: 5**	**3.8**	**8**	**29.2**	**23.7**	**13.7**	**12.7**	**9**
	FM's: 1*	**8.3**	**16.7**	**50**	**16.7**	**4.2**	**—**	**4**
Soft intl. hits	**AM's: 2***	**2.7**	**4.1**	**14.2**	**25.6**	**30.2**	**11.7**	**11**
	FM's	**—**	**—**	**—**	**—**	**—**	**—**	**—**
Spanish Top 40	**AM's: 3**	**1.3**	**4.2**	**6.7**	**15.9**	**12.2**	**11.5**	**8**
	FM's: 3	**14.9**	**22**	**29.4**	**17.9**	**12.9**	**1.7**	**1**
Spanish news/talk	**AM's: 10**	**1.8**	**5**	**18.8**	**18.8**	**17.5**	**14.8**	**23**
	FM's	**—**	**—**	**—**	**—**	**—**	**—**	**—**

**Total number of stations too low to be reliable. Audience composition based on 12-plus average quarter hour for total MSA. Source: Katz Hispanic Radio.*

THE EXPANDING APPETITE OF TELEVISA

The Mexican broadcasting giant Televisa, long an important presence in Latin America and the U.S. Spanish-language TV market, is moving to broaden its reach into Europe, with a central focus on Spain's expanding TV sector.

In an interview, Televisa Executive Vice President Alejandro Burillo said the company's main European foray so far has been the 24-hour Spanish-language news service, ECO, which it launched in September 1988. Using the European satellite Eutelsat, PanAmSat and other satellites, ECO reaches satellite and cable viewers throughout Europe, the Americas and parts of Africa.

Burillo said Televisa's TV production arm is also open to dialogue with European, particularly Spanish partners. Televisa already yields an enormous 25,000 half-hours annually for the domestic Mexican market. Joint efforts are possible both in entertainment programming and, in a possible venture with Spain's news agency EFE, with the information field, he added.

The company is looking for expansion in its print medium holdings as well—Televisa is a major investor in the U.S. sports daily *The National* and Burillo said the company may consider a European version in the next two years, delivered daily from the U.S. via satellite.

Programing production is a primary focus for Televisa, said Burillo, and the company's output is also distributed worldwide to nearly 40 nations in Europe, Asia and the Mideast, with growth in international program demand boosting international sales a reported 30%-50% this past year for Protele, a unit of the Los Angeles-based Univisa operation held by Televisa's principal owners.

A potential boost to Televisa's overseas expansion may come if and when the privately-held company decides to go public with up to 35% of its shares. According to Burillo: "We are thinking about it, but it now is not a very good moment to go out to the public. We will wait until next year."

Televisa's business has continued to build in the U.S., where at one time the company owned the dominant group of Spanish-language TV stations before being forced to divest in 1988 under FCC foreign ownership rules. Through Protele, some 7,000 hours annually of Televisa programing make their way onto U.S. airwaves, giving it a 40%-45% market share in U.S. Hispanic TV.

In addition, Univisa's Spanish-language cable service Galavision feeds Televisa news programing directly to independent KWHY-TV Los Angeles and will soon go, according to Burillo, to a Houston independent.

The company, whose start in radio some six decades ago earned it the moniker "The Voice of Latin America," has not ignored its own country or the region either. Some 800 Latin American TV channels are partially fed by Televisa productions, it claims.

In Mexico, Televisa's dominance could hardly be greater. Referring to itself as a "social communications system," the company controls some 250 affiliated corporations and employs 15,000.

Among its holdings are two four-decade-old national TV stations and two of Mexico City's leading local TV stations, with an operation encompassing nearly 100 separate broadcasting centers, 55 repeaters and 28 translators. Its eight radio stations have 90% of the ad market (with the top three FM's in Mexico each airing youth-oriented programs), and a group of successful AM's airing more older-targeted news and entertainment.

The company's affiliates also include the 16-channel Cablevision cable operation reaching 100,000 of the country's approximately 9.5 million TV households, the home video distribution company VideoVisa, the film production company Televicine, record labels (which it may seek to expand following a possible public offering), dubbing and subtitling companies, live concert promotion, exports ventures, the Televisa Cultural Foundation, two top soccer teams, the largest stadium in Mexico and an exhibition center.

But Burillo said the media company is not stopping there. Experimentation with the new technology of high-definition television is being pursued, apparently both for a satellite-to-theater delivery system and for a terrestrially-delivered movie service using the NHK system.

According to Burillo, the HDTV theater project, which could start up as soon as 1991, is being prompted by the lack of existing theaters in Mexico City, where Burillo said just 200 facilities serve 25 million people. —AAG

$21,000,000

in radio station sales

over the last four months.

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CHANGING HANDS

This week's tabulation of station and system sales ($250,000 and above)

PROPOSED STATION TRADES

By volume and number of sales

Last Week:
AM's □ **$9,779,649** □ **5**
FM's □ **$710,000** □ **1**
AM-FM's □ **$5,072,500** □ **4**
TV's □ **$0** □ **0**
Total □ **$15,562,149** □ **10**

Year to Date:
AM's □ **$105,223,554** □ **356**
FM's □ **$474,427,261** □ **228**
AM-FM's □ **$355,972,727** □ **207**
TV's □ **$827,676,900** □ **88**
Total □ **$1,763,300,442** □ **879**

For 1989 total see Feb. 5, 1990 BROADCASTING.

■ WCOA(AM)-WJLQ(FM) **Pensacola, Fla.** □ Sold by Norman S. Drubner to BREM Broadcasting for $2.23 million cash at closing. **Seller** owns WVGO(FM) Richmond, Va.; KXYQ(AM)-KZRC(FM) Portland, Ore., KIVA(AM)-KZRQ(FM) Santa Fe-Albaquerque, N.M.; KGRX-FM Globe (Phoenix), Ariz.; application for sale of KRIX(AM)-KRGE(FM) McAllen-Brownsville, Tex., has been granted ("For the Record," Sept. 17). **Buyer** is headed by Edmond J. Muniz and also owns WYAT(AM)-WLTC(FM) New Orleans, and has 75% interest in WGCM-AM-FM Gulfport, Miss. AM is fulltimer with adult contemporary and talk format on 1370 khz with 5 kw. FM has contemporary hit format on 100.7 mhz with 100 kw and antenna 1,555 feet above average terrain. *Broker: Randy Jeffrey of Media Venture Partners.*

■ WQIZ(AM)-WKQB(FM) **Charleston, S.C.** □ Sold by Trident Communications Corp. to Barton Broadcasting Corp. for $1.5 million cash at closing. **Seller** is owned by the O'Leary Family Trust and has no other broadcast interests. **Buyer** is headed by Charles A. Barton and has no other broadcast interests. AM has gospel format on 810 khz with 50 kw day. FM has CHR format on 107.5 mhz and antenna 984 feet above average terrain. *Broker: Randy Jeffrey of Media Venture Partners.*

■ KRLN-AM-FM **Canon City, Colo.** □ Sold by KRLN Inc. to Lowrey Communications Inc. for $900,000 cash at closing. Price includes noncompete covenant and consulting agreement. **Seller** is headed by Norton E. and Diana H. Warner, husband and wife. Norton has 57% interest in Warner Enterprises, which owns KRLN Inc., licensee; KABI Inc., licensee of KABI(AM)-KSAJ-FM Abilene, Kan.; KLIN Inc., licensee of KLIN-AM-FM Lincoln, Neb. Warner also has interest in First Star Corp., licensee of KSTR-AM-FM Grand Junction, Colo. **Buyer** is headed by Paul E. Lowrey, who owns 70% interest in Windsor Communications, licensee of WHSM-AM-FM Hayward, Wis. AM is fulltimer with MOR format on 1400 khz with 1 kw. FM has country format on 103.9 mhz with 3 kw and antenna 520 feet below average terrain.

■ KIKR(AM) **Conroe, Tex.** □ Sold by Family Group Enterprises Inc. to U.S. Radio Ltd. for $750,000 cash at closing, of which $50,000 is for five-year noncompete covenant. **Seller** is headed by Rigby Owen and Rigby Owen Jr., and has no other broadcast interests. **Buyer** is headed by Ragan Henry, Michael O. Driscoll, Sheila Weiss, Patricia M. Hussey, Robert J. Hughes, Robert A. Woodward, Donald L. Kidwell, Peter Ferrara and John Broomfield, and is licensee of WBSK(AM) Portsmouth, WQOK(FM) South Boston and WOWI(FM) Norfolk, all Virginia; KJOI(FM) Conroe, KGLF-FM Freeport and KHEY-AM-FM El Paso, all Texas; WAKR(AM)-WONE-FM Akron, Ohio; WCOS-AM-FM Columbia, S.C.; WRAW(AM)-WRFY-FM Reading, Pa., and is proposed assignee of WRXJ(AM)-WCRJ-FM Jacksonville, Fla., and WAYV(FM) Atlantic City. KIKR has C&W format on 880 khz with 10 kw day and 1 kw night.

■ KWCB(FM) **Floresville, Tex.** □ Sold by Wilson County Broadcasting Co. to April Communications Group Inc. for $710,000. Price includes $10,000 cash at closing, $25,000 escrow deposit, $505,000 59-month promissory note at 10%, and $170,000 four-year noncompete covenant. **Seller** is headed by A.B. Gonzalez and has no other broadcast interests. Buyer is headed by John W. Barger, Darla S. Barger, husband and wife, and John R. Furr, and has no other broadcast interests. KWCB has C&W format on 94.3 mhz with 3 kw and antenna 328 feet above average terrain.

■ KIUL(AM) **Garden City and** KWKR(FM) **Leoti, both Kansas** □ Sold by KIUL Inc. to Ronald C. Isham for $450,000. Price includes $445,500 cash at closing, $4,500 escrow deposit and five-year noncompete covenant of unknown value. **Seller** is headed by Isham, Elton E. Jewell and John G. Harris. Harris has interests in Harris Enterprises, licensee of KGRI-AM-FM Grand

FOR THE RECORD

As compiled by BROADCASTING from Nov 29 through Dec 5 and based on filings, authorizations and other FCC actions.

Abbreviations: AFC—Antenna For Communications. ALJ—Administrative Law Judge. alt.—alternate. ann.—announced. ant.—antenna. aur.—aural. aux.—auxiliary. ch.—channel. CH—critical hours. chg.—change. CP—construction permit. D—day. DA—directional antenna. Doc.—Docket. ERP—effective radiated power. Freq.—frequency. HAAT—height above average terrain. H&V—horizontal and vertical. khz—kilohertz. kw—kilowatts. lic.—license. m—meters. mhz—megahertz. mi.—miles. MP—modification permit. mod.—modification. N—night. pet. for recon.—petition for reconsideration. PSA—presunrise service authority. pwr.—power. RC—remote control. S-A—Scientific-Atlanta. SH—specified hours. SL—studio location. TL—transmitter location. trans.—transmitter. TPO—transmitter power output. U or unl.—unlimited hours. vis.—visual. w—watts. *—noncommercial. Six groups of numbers at end of facilities changes items refer to map coordinates. One meter equals 3.28 feet.

OWNERSHIP CHANGES

Applications

■ **KVOG(AM) Greenwood, AR** (BAL901116ED; 1510 khz; 1 kw-D)—Seeks assignment of license from Greenwood Community Broadcasting Corp. to Pharis Broadcasting for $23,769. Seller is headed by David Morrison, Robert E. Yoes and Stephen A. Marino, and has no other broadcast interests. Buyer is headed by William L. and Karen Pharis, husband and wife. William Pharis owns 51% of Pharis Broadcasting, licensee of LPTV K46BZ Ft. Smit and K50CO Hackett, both Arkansas. Filed Nov. 16.

■ **KPBA(AM) Pine Bluff, AR** (BAL901114EC; 1270 khz; 5 kw)—Seeks assignment of license from Metropolitan Media Group Inc. to Family Time Ministries Inc. for $40,000. Seller is headed by Carl E. and Carlene Jones, husband and wife, and has no other broadcast interests. Buyer is headed by Amir M. Khan, and has no other broadcast interests. Filed Nov. 14.

■ **KCRE-AM-FM Crescent City, CA** (AM: BAL901114EA; 1310 khz; 1 kw-D; FM: BALH901114EB; 94.3 mhz; 3 kw; ant. -275 ft.)—Seeks assignment of license from Ber Tec Broadcasting Inc. to Pelican Bay Broadcasting Corp. for $442,500. Seller is headed by Robert C. Berkowitz, David E. Tecker and Sharon C. Tecker, husband and wife, and has no other broadcast interests. Buyer is headed by Laurence Goodman and Linda J. Goodman, husband and wife. Laurence Goodman is 100% shareholder of Bay Broadcasting Corp., licensee of KHSN(AM) Coos Bay and KOOS(FM) and North Bend, both Oregon; renewal applications are currently pending for both stations. Filed Nov. 14.

■ **KSPE(AM) Santa Barbara, CA** (BAL901115EB; 1490 khz; 1 kw-U)—Seeks assignment of license from Pacific Broadcasting Co. to Spectacular Broadcasting Inc. for $302,000 in transfer of stock. Seller is headed by Richard E. and Richard C. Marsh, father and son, Robertson C. Scott and Robertson C. Scott Jr. and Harvey Pool. Buyer is headed by Richard C. and Richard E. Marsh, has no other broadcast interests. Filed Nov. 15.

■ **KZYR(FM) Avon, CO** (BTCH901114HY; 103.1 mhz; 1.5 kw; ant. 459 ft.)—Seeks assignment of license from Rocky Mountain Wireless Inc. to Jerrell K. Davis for no cash consideration in stock acquisition agreement. Seller is headed by Ronald J. Mellon & Duane H. Capouch, and has interests in Roaring Fork Radio, which as application for new FM at Basalt, CO. Buyer, Jerrell K. Davis, is currently president of licensee. Filed Nov. 14.

■ **KRLN-AM-FM Canon City, CO** (AM: BAL901115EC; 1400 khz; 1 kw-U; FM: BALH901115ED; 103.9 mhz; 3 kw; ant. -520 ft.)—Seeks assignment of license from KRLN Inc. to Lowrey Communications Inc. for $900,000. Seller is headed by Norton E. and Diana H. Warner, husband and wife. Norton has 57% interest in Warner Enterprises, which owns KRLN Inc., licensee of KRLN-AM-FM Canon City, CO; KABI Inc., licensee of KABI(AM)-KSAJ-FM Abilene, KS; KLIN Inc., licensee of KLIN-AM-FM Lincoln, NE. Warner also has interest in First Star Corp., licensee of KSTR-AM-FM Grand Junction, CO. Buyer is headed by Paul E. Lowrey, who owns 70% interest in Windsor Communications, licensee of WHSM-AM-FM Hayward, WI. Filed Nov. 15.

■ **WLVS(AM) Lake Worth, FL** (BAL901109EC; 1380 khz; 1 kw-D, 500 w-N)—Seeks assignment of license from Gold Coast Broadcasting Co. to Gold Coast Broadcasting for $24,450 in stock transfer between partners. Transferees are S. Knox and Jerry L. Phillips, brothers, sons of Sam C. Phillips. Sam Phillips owns 51% of Gold Coast. Sam, S. Knox and Jerry L. Phillips have interests in Big River Broadcasting Corp., licensee of WSBM(AM)-WQLT(FM) Florence,

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

SERVICE	ON AIR	CP's [1]	TOTAL *
Commercial AM	4,984	240	5,224
Commercial FM	4,368	908	5,276
Educational FM	1,436	296	1,732
Total Radio	10,788	1,444	12,232
Commercial VHF TV	552	18	570
Commercial UHF TV	561	186	747
Educational VHF TV	125	3	128
Educational UHF TV	228	17	245
■ Total TV	1,466	224	1,690
VHF LPTV	181	167	348
UHF LPTV	588	1,048	1,636
■ Total LPTV	769	1,215	1,996
FM translators	1,854	323	2,177
VHF translators	2,711	101	2,812
UHF translators	2,240	390	2,630

CABLE

Total subscribers	53,900,000
Homes passed	71,300,000
Total systems	10,823
Household penetration†	58.6%
Pay cable penetration	29.2%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 92.1 million. [1] Construction permit. [2] Instructional TV fixed service. [3] Studio-transmitter link. Source: Nielsen and Broadcasting's own research.